Information Organization, Usability, Currency & Accessibility (IOUCA)
Working Group
California Portal Steering Committee

Date: March 28, 2006
Time: 9:00 – 11:00 a.m.
Location: LC II, Room 340

Attendees:

☒ Neal Albritton (DOR)	☒ Shayn Anderson (EDD)	☒ Steve Branson (DHS)
☐ Steve Clemons (CEAP)	☐ Mary Fernandez (SPB)	☐ Donna Freeman (FTB)
☐ Theresa Giles (DHS)	☒ John Jewell (CSL)	☐ Patrick Johnson (DOR)
☒ Anamarie Malone (DTS)	☐ Liz Mechem (Insurance)	☒ Claudina Nevis (SCIO)
☒ Joni Ogata (DMHC)	☒ Kristine Ogilvie (CSL)	☐ Rob Quigley (SCIO)
☒ Deborah Schwartz (CRB)	☒ Rick Vagg (DTS)	☐ Dan Whetstone (DTS)
☒ Loren Weatherly (Visiting, EDD)		

Review Minutes from Previous Meeting   Debbie Schwartz

The minutes for the March 21st meeting are not ready for review.

Recommendation on FTB Template   Working Group

Accessibility: DOR completed the preliminary accessibility review of the FTB design. They tested the entire sample website using WebAIM, Cynthia, and Watchfire. There were no Priority 1 errors; the sample site should meet all standards being proposed by the IOUCA. Neal provided copies of the Watchfire report to the working group. The primary problem encountered was the sizing of the fonts; it should be set to relative sizing to be accessible. The search box is inaccessible by a screen reader; it should be set for dynamic spacing.

DOR recommends using skip navigation, placing hyperlinks at the top left of each page to allow users to go to other parts of the page with a single click. Common links in skip navigation are content, main navigation, accessibility features, footer, and site map. Links should be viewable on the screen. Skip navigation assists users with limited or no vision as well as users with limited mobility. Neal provided an example of skip navigation instructions and issues that is posted on the California State Legislature website. He noted that the site was very good, but could be improved by including information on how to adjust your browser (resize, adjust contrast, etc.).

DOR noted that users should be able to tab through a page rather than using a mouse. Warnings about event handlers appeared in the Watchfire report, but DOR tested with a live user and found that this wasn't a problem.

New Design Procedure: The FTB timeline was in accord with the proposed procedure for new design templates. The only difference was that FTB's design was approved by the State CIO; the recommended process calls for review by IOUCA and approval by State Portal Steering Committee.

Top Level Standards, Guidelines, and Best Practices   Working Group

Accessibility: Neal is cleaning up the recommended accessibility standards; he anticipates completion in 1-2 weeks. Debbie will show him the POST document for possible format as discussed at the March 21st meeting.

Usability: Donna sent an eMail to the working group last week. Human Factors International (HFI) has denied our request to use the recommendations they provided FTB under contract and their checklist for website usability. Donna is developing the usability standards; she pulled the

federal government standards listed at usability.gov and sorted them by importance in table format. The working group can go to www.usability.gov for details.

Proof of Concept Using SCIO Templates   Debbie

The subgroup is still working on the charter; we can't start the proof of concept until the IOUCA's recommended standards are complete. The subgroup will work on planning until then. The next subgroup meeting is in two weeks.

Open Forum – Recommendations From Team   All

1. Neal recently returned from the Annual Assistive Technology Convention hosted by California State University, Northridge. This is one of the biggest international events on accessibility. He found that approximately four companies are doing Section 508 accessibility reviews of websites; they focus on automated checks rather than live person checks. He saw new technology and reminded the group that we need to remain flexible to accommodate new technology. Neal met an organization that may be helpful if additional 508 training (beyond the training contracted for August/September 2006) is needed. They are happy to speak to the IOUCA. To the best of Neal's knowledge, no other states have formed a group like the IOUCA. The IOUCA is cutting edge. California is the only state that has adopted Section 508 in full; 35-38 states have adopted some level of 508.

2. Debbie passed out copies of SB 796, a chaptered senate bill enacting the Government Modernization, Efficiency, Accountability, and Transparency Act of 2005. Kris reviewed the bill for the working group. Per the bill, any department that posts licensing transactions on its website must have full accessibility by January 1, 2007 including but not limited to plain language, frequently asked questions, and contact links. The working group is aware of the bill.

3. The Department of Managed Health Care (DMHC) is redesigning their website. Their site is divided into four main sections – consumer, medical providers, health plans, and about DMHC. A new banner was designed and approved by the State CIO. A vendor was hired to redesign the consumer section. Their template is complete and they are populating pages and completing the site map. The vendor provided DMHC copies of the template in html and jpeg; DMHC won't have access to the actual templates until the vendor has completed work. They estimate completion in the next two weeks. DMHC has decided that they will not publish any section until all sections are complete. Once the templates are available, DMHC would like the site checked for accessibility. DOR agreed to test the site in 2-3 weeks when the templates are available; testing will require a longer turn-around time than was required to test FTB's design due to workload.

4. DOR's RFP for Section 508 training for webmasters was awarded to Design Media. Neal will meet with them on April 3 to discuss the contract. He recommended they attend the IOUCA working group meeting on April 11 for introductions and to open lines of communication. The vendor will give the working group a high-level overview of their deliverables.

   Neal noted that per the contract, all training materials will become the property of the State of California at the conclusion of the contract (September 30, 2006). The IOUCA can use these training materials to develop ongoing accessibility training for state employees. The

working group will consider asking the DTS Training Center to house and maintain the training materials for ongoing training. DHS requested a set of the training materials for inclusion in their department training center; their department has 350 webmasters. The IOUCA will need to determine a process for sharing the training tools and sustaining the information.

5. The State CIO is considering scheduling an all-IT leadership meeting on April 28, 2006. It would be attended by CIO's, AIO's, and some managers. Some webmasters may also be asked to attend. The State CIO's office asked that the IOUCA prepare a 10-15 minute presentation about the group and it's mission. There was some concern voiced that the group is not yet far enough along in terms of communication and that we don't yet have any documents that we can refer users to. The group decided that a high-level presentation about the group, focused on the standards and guidelines we are developing could improve communications.

ACTION: Prepare a draft presentation for the working group to review at the April 4th meeting. The presentation should be designed so it can be reused in subsequent presentations as well as a stand-alone communication. Once presented, the slides could be posted on the CIO website to be shared with others in the future. IOUCA will be the link between Section 508 by DOR and the webmasters.

Assigned To: John Jewell and Debbie Schwartz

Due: April 4, 2006

6. Portal Redesign Project (PRP) is working to publish their search engine survey at the end of this week. They are approaching the survey from two directions – the people entering at the state homepage, and the CIO's and IT Infrastructure staff within state government. They plan to have the results in one week.

PRP continues to develop their work plan. They have two RFO's on the street – one for look & feel and accessibility, the other for the payment engine. They are still interviewing vendors who responded to the RFI.

Highlights of the Look & Feel/Accessibility RFO:

- Best practices (especially services-based practices)
- Best look, feel, and design criteria for services-based websites\
- What should be included regarding accessibility and usability
- Six month deliverables-based contract
- Focus will be high-level, not detailed
- Rick will provide the IOUCA with a copy of the RFO.

PRP is working on funding strategies and the FSR issue. A meeting is being scheduled for next week with PRP, Clark Kelso, PK Agarwal, and Claudina Nevis to discuss the FSR and support from the Governor's office.

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Open Issues   **Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
    The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14ᵗʰ that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.

2. How can California enforce the standards after adoption?
    California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.

3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,

    Level 1 Standards: Minimal accessibility

    Level 2 Standards: Moderate accessibility

    Level 3 Standards: High accessibility

    Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

Action Items   **Kris Ogilvie**

ACTION: Prepare a plan to establish ongoing communication with webmasters; may want to organize along the lines of the federal government's content managers forum.

ACTION: Send an email to Neal emphasizing the importance of DOR's involvement in the proof of concept.

> ***Assigned To**: John Jewell*
> ***Due**: April 4, 2006*
> ***Update**: Claudina and Neal will identify what the IOUCA needs from DOR. Once the needs have been identified, Clark Kelso will call the DOR director to emphasize the criticality of DOR's involvement in the working group.*

ACTION: Identify formats currently being used on California web pages.

> ***Assigned To**: Steve Clemons*
> ***Due**: April 4, 2006 (Update)*
> ***Update**: Debbie will contact Steve for an update.*

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ACTION: Frame the issue of application accessibility and usability.

> *Assigned To: Steve Clemons*
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> *Due: April 4, 2006 (Update)*
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> *Update: Debbie will contact Steve for an update.*

ACTION: Conduct high level research and frame the issue of accessibility and usability in regards to online forms.

> *Assigned To: Steve Clemons*
>
> *Due: April 4, 2006 (Update)*
>
> *Update: Debbie will contact Steve for an update.*

ACTION: Provide a copy of the notes from the conference call with Center for Digital Government (CDG).

> *Assigned To: Debbie Schwartz*
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> *Due: March 28, 2006*
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> *Update: Complete. Debbie provided a paper copy with the agenda; an electronic copy will be sent with these minutes. The notes are for IOUCA member information only; they should not be posted to the CIO website with the minutes.*

ACTION: Complete the accessibility standards and guidelines workbook.

> *Assigned To: Neal Albritton*
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> *Due: April 4, 2006 (Update)*
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> *Update: In progress.*

ACTION: Complete the preliminary accessibility review of the FTB templates.

> *Assigned To: Neal Albritton*
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> *Due: March 28, 2006 (Update)*
>
> *Update: Complete. Neal provided copies of the Watchfire report. See minutes for details.*

ACTION: Post amended list of usability recommendations and FTB's implementation status on working group website.

> *Assigned To: Donna Freeman*
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> *Due: April 4, 2006*
>
> *Update: We cannot use the guidelines provided by HFI. Donna is developing recommendations and guidelines using other sources.*

ACTION: Draft usability standards, guidelines, and best practices.

> *Assigned To: Donna Freeman*
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> *Due: April 4, 2006 (Update)*
>
> *Update: We cannot use the guidelines provided by HFI. Donna is developing recommendations and guidelines using other sources.*

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ACTION*: Develop a beginner's version of the workbook.*

       Assigned To*: Neal Albritton*

       Due*: April 4, 2006 (Update)*

ACTION*: Complete the detailed accessibility review of the FTB templates.*

       Assigned To*: Neal Albritton*

       Due*: April 4, 2006*

       Update*: Plan to begin next week after preliminary analysis is complete. It will take two weeks to complete.*

ACTION*: Post the workbook on the IOUCA working group website.*

       Assigned To*: Neal Albritton/Donna Freeman*

       Due*: April 11, 2006 (Update)*

ACTION*: Using the list of formats currently being used on California web pages, note which formats are completely accessible, and identify conversion options for formats that are not completely accessible.*

       Assigned To*: Steve Clemons and Neal Albritton*

       Due*: April 18, 2006 (Update)*

       Update*: Delayed update three weeks; dependent on completion of list of formats to begin.*

ACTION*: Discuss a process for disseminating information to a wide audience quickly.*

       Assigned To*: John Jewell and Dan Whetstone*

       Due*: April 18, 2006 (Update)*

ACTION*: Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.*

       Assigned To*: Claudina Nevis and Liz Meecham*

       Due*: April 25, 2006 (Update)*

       Update*: Update in one month.*

Next Steps   **Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: March 21, 2006

                          Library & Courts II, 900 N Street, Room 340

                          9:00 – 11:00 a.m.

New Agenda Item: Debbie will add an agenda item to discuss style sheets and to determine if they should be standards or guidelines. Steve and Patrick will present a demonstration on the benefits and uses of style sheets, including the business drivers and risks of not using style sheets. Debbie will provide a laptop and projector for the demonstration.